Wolters Kluwer

Release Notes

Release 4.1
January 2023

CCH Axcess™ Client Collaboration

Welcome to CCH Axcess Client Collaboration Release 4.1

This bulletin provides important information about the 4.1 release of Client Collaboration. Please review this bulletin carefully. If you have any questions, additional information is available on CCH Support Online.

New in this Release - Firm Updates

Secure Two-Way Messaging for Business Requests
With this release, you can begin exchanging secure messages with your business clients using the Secure Two-Way Messaging feature in Client Collaboration. Messages can be sent by the client or by the firm. Icons next to the client's name on the Requests Dashboard indicate when there are new or outstanding messages that need to be addressed. Users can assign messages to themselves or to one of the client responsible staff roles.

Note: Staff assigned to specified client responsible staff roles will receive an email notification when messages are received. To keep communications secure, message contents are never sent via email. Instead, users must log in to the Client Collaboration dashboard to retrieve messages.

Message Center for Business Requests
The Message Center is now available for business client requests. The Message Center lists all the unresolved messages for the logged in user. An icon to access the Message Center is displayed at the top of the screen, next to the user profile icon. A badge on the Message Center icon indicates the number of new or unresolved messages assigned to the logged-in user.

Export Status Dashboard Grids
A new Export Grid feature has been added to each of the status dashboard grids. When selected, a CSV file will be generated in the background and automatically downloaded to your workstation. The CSV file will include all client requests across all pages for the given status dashboard where Export Grid was selected. If you filtered the status grid, only those filtered clients will be exported. The CSV file will include the percentages completed and due dates for each client request.

Finalized Status Confirmation Message
When moving a request to the Finalized status, you will now be prompted to accept a confirmation message. Once a request is moved to the Finalized status, the status cannot be changed, the request cannot be deleted, and the request cannot be re-opened in the current year.

Resending the Invitation and Welcome Back Emails
The Resend Invitation email option in the Actions menu now includes the Welcome Back email. When selected, the Invitation email will be sent to the client users who have not registered, and the Welcome Back email will be sent to previously registered users.

Business Tax Return Center Updates
The Tax Return Center for business requests is now available from the Actions menu for the Introductory (Invitation) Requests. The Tax Return Center is now available for all Business Requests.

Manage Business Client Users from all Statuses

After the business client request has been sent, you can manage business client users for each business request. From any status grid, select the people icon for any client request to display a screen where you can Add, Link, Edit, and Unlink users. When a new business client user is added or linked, the new user will be sent an email and automatically invited to the client request.

Edit Client Request Settings

You can now edit business return request settings, including Client User Management, from the Client Progress and Overdue statuses.

New in this Release - Client Updates

Secure Two-Way Messaging for Business Requests

With this release, your business clients can now securely exchange messages with your firm. Messages can be sent by the client or by the firm. Staff assigned to specified client responsible staff roles will receive the initial email notification when messages are received from clients. To keep the communications secure, message contents are never sent via email. Clients must log into Client Collaboration to retrieve messages.

Message Center for Business Requests

The Message Center is now available for business client requests. The Message Center lists of all the unresolved messages for the logged in user. An icon to access the Message Center is displayed at the top of the screen, next to the user profile icon. A badge on the Message Center icon indicates the number of new or unresolved messages assigned to the logged-in user. The Message Center tile on your clients' Home Page displays new messages or messages needing their attention when they login for all current year service requests they've been invited to.

Client Login - Forgot User ID

A registration link can now be resent to an invited client user who has not registered by using the Forgot User ID option from the client login screen.

Reminder Email Improvements

The Reminder email now includes instructional information for requesting a new registration link and a link to a video explaining how to retrieve their User ID.